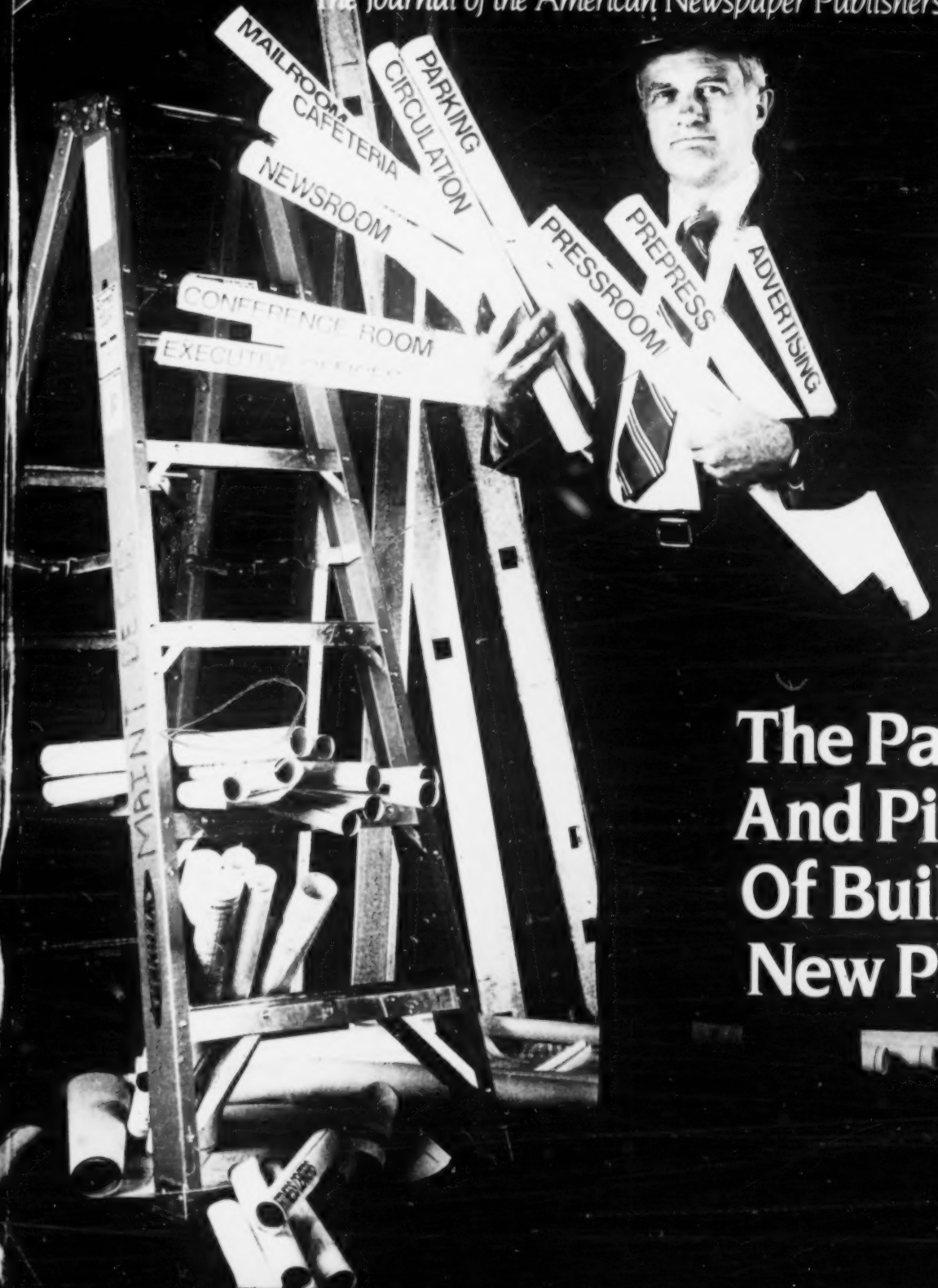
Malady Known as 'RSI' Takes Toll at Newspapers

presstime

The Journal of the American Newspaper Publishers Association



The Payoffs And Pitfalls Of Building New Plants

presstime

INDEX VOLUME 11, NUMBER 6 JUNE 1989

Special Report *From coast to coast and everywhere in between, newspapers are building new facilities and renovating buildings. In some areas new plants are following readers to the suburbs, and in others they are being rebuilt in the original downtown area. Wherever they are sited, newspaper facilities sprawl across the landscape with bigger pressrooms and mailrooms. There is another important trend as well. In an effort to attract and keep employees, amenities from jogging trails to child-care centers are being factored into some blueprints.* 32

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Female editors *Although a distinct minority in newsrooms, women are reshaping the definition of news. And guess what? Men helped.* 16

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CHAIRMAN'S CORNER

Special activity has begun in two priority areas

Two key initiatives are under way after launch at the Chicago Convention, with high-level coordination groups, escalated emphasis and increased resources. They are intended:

First, to help newspapers enhance their circulation and readership.

Second, to preserve the telecommunications conduit/content "diversity principle" in law.

Success on both fronts will result in immediate and long-range benefits for every newspaper in North America.

The *Circulation and Readership Steering Group* will be headed by ANPA Director John Curley of Gannett Co., helped by Jim Batten of Knight-Ridder, Burl Osborne of The Dallas Morning News, Reg Murphy of The Baltimore Sun and Walter Mattson of The New York Times. Drawing on an in-depth internal analysis completed last month by staff experts of ANPA and the Newspaper Advertising Bureau, they will focus our effort on four strategies:

William H. Cowles 3rd

- *Process*: How to assist individual newspapers through proven programs that give circulation and readership high priority over time.
- *Customers*: How newspapers can discover and satisfy customers' diverse information needs now and in the future; how to guarantee high-quality service; and how to build our future audiences.
- *Product*: How to help editors make their papers more compelling and essential so they add value to readers' lives, provide specific benefits for regular reading and are easy to use.
- *People*: How newspapers can recruit, retain, supervise and train high-quality staff.

The *Telecommunications Steering Group* will be coordinated by ANPA Vice Chairman Lloyd Schermer of Lee Enterprises, assisted by Frank Blethen of The Seattle Times, Charlie Brumback of the Tribune Co., Bob Erburu of The Times Mirror Co., Bob Johnson of Newsday and George Wilson of the Concord (N.H.) Monitor.

Their expertise will lead us in an all-out campaign to safeguard the diversity principle from ill-considered court challenges and from the massive but poorly founded congressional lobbying efforts of regional telephone companies to gain unfair control of America's information future [presstime, May 1989, p. 48].

The American people will be better served by a Congress willing to reaffirm its commitment to a policy that encourages diversity of information sources. I know you will want to join the effort in ways appropriate to your own individual convictions, and I thank you in advance for that.

It is fitting that these two initiatives began at the recent Convention so superbly produced by Charlie Brumback and his Convention Arrangements Committee. For if an annual Convention ever focused our attention on important issues for ourselves and for our society and brought forward inspired leadership, Chicago did!

Bill Cowles

William H. Cowles 3rd
ANPA Chairman

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Consultation Bridge Built For Waste-Paper Stream

BY TONDA F. RUSH
and KEVIN GRANT

A group of newspaper executives and newsprint producers sat down May 5 with a delegation from the Northeast Governors Conference called the Northeast Recycling Council. The purpose, said the organizers candidly, was to see what the state governments had to do to get newspapers to use more recycled newsprint.

The discussion was conducted cordially, if somewhat gingerly. State recycling experts talked about a glut of old newspapers being amassed on the East Coast where recycling programs have foundered because of an insufficient market for recycled products. Newspaper people talked about their mixed experiences with recycled newsprint.

The talk was going smoothly enough until someone mentioned the time McDonald's ran a free-standing insert with a phonograph record in it. The plastic, it was said, really gummed up the works at Garden State Paper Co., the oldest producer of recycled newsprint in the country. This was typical of the kinds of quality challenges facing the recyclers.

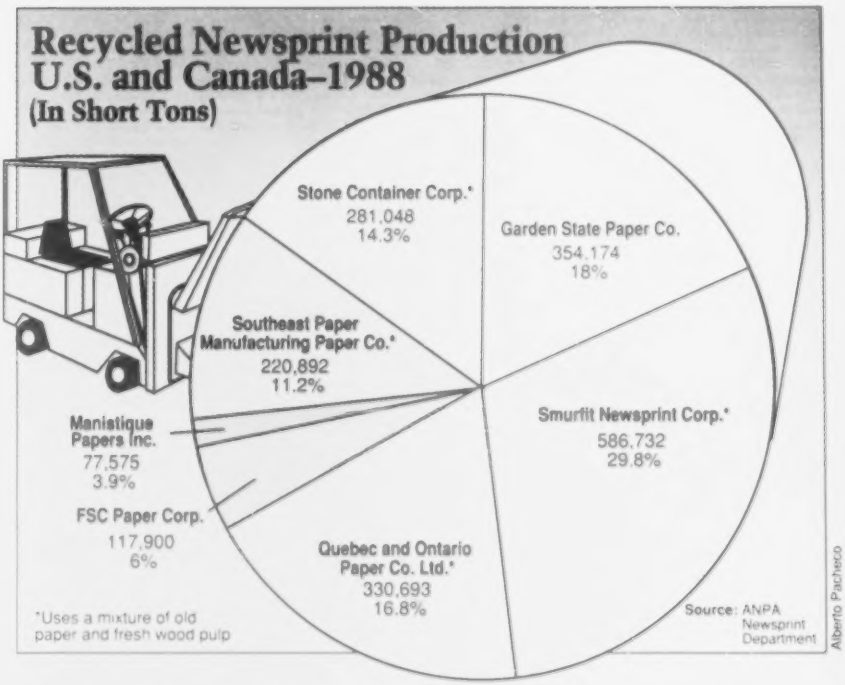
That was when one state official whose mission, after all, is to manage solid waste, not to promote newspapers, made the comment that sounded like a wake-up call.

"Maybe it is time for newspapers to begin exercising responsibility about the types of advertising they accept. Maybe things like the McDonald's ad belong in direct mail."

Rush is ANPA director/newspaper plans and projects. Grant is ANPA manager/state affairs.

Tonda F. Rush

Kevin Grant



Heads nodded. They all belonged, not surprisingly, to the government people in the room.

Other heads looked up in surprise. Smiles froze on their faces. This guy, you could see them all saying to themselves, couldn't be serious.

Finally, Newsday Publisher Robert M. Johnson, who has become the Smokey the Bear of recycling, stood and looked at the man. "You can forget that idea. You will never sell it," he said.

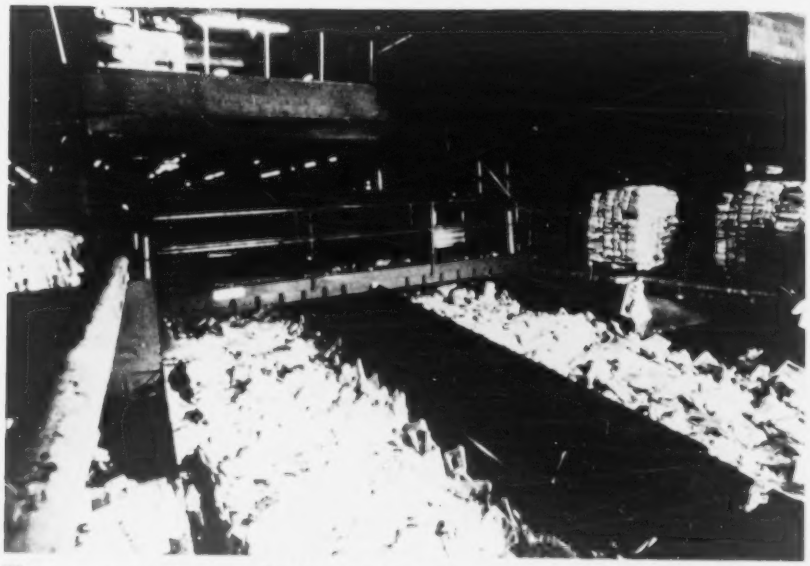
There was tension, no mistake about it. The newspaper people realized that the government managers found such a proposal to regulate the advertising market perfectly reasonable. They call it " "source reduction." And to the government people, the message was clear that from the newspaper business, at least, cooperation was freely offered, but coercion could pull the plug.

Yet when the meeting ended—possibly the first time in history that such a large group of newspaper people sat down with such a disparate group of government people to figure out what to do about trash—a bridge for consultation had been built.

No commitments were made, no ground given. The state government people continued to threaten newsprint taxes and disruptive laws to require use of recycled newsprint. The newspaper people continued to say they could not use more recycled newsprint than the market will produce. But all sides agreed to keep talking.

After all, whether the speakers were newspaper people or government officials, they all live in states where the landfills are about to fill up. And they were all concerned.

But what about all the food packaging and the lawn clippings in landfills? Is any-



Waste newspapers enter the production stream at Garden State Paper Co.'s Garfield, N.J., mill that produces 100-percent recycled newsprint.

thing being done about them? What about the advertising mail? Are the states going to try to tax it, too?

Yes, in fact, they might, if they can find a way to do it. But right now, newspapers are in the bullseye.

Why?

They are visible. They use about 6-percent of landfill space. Newspapers look more like other newspapers than packages look like other packages. They draw attention to themselves.

They are recyclable. Unlike food waste and some other paper products, they can be reused.

Newspapers editorialize about responsible solid waste management, but what do they do about it? When stacks of old newspapers pile up in recycling centers with no buyers in sight, will the local publisher begin to think harder about using recycled newsprint?

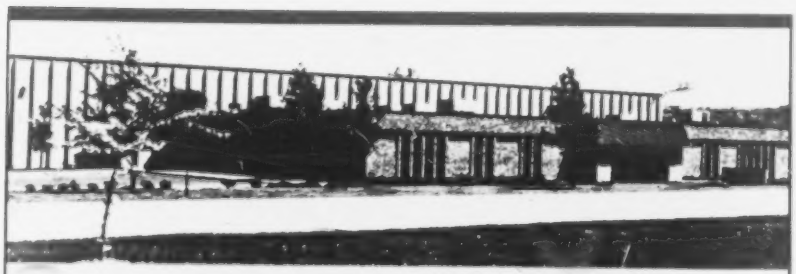
These discussions are beginning all over the country—now in the Northeast and in California; newly begun in Oregon, Wisconsin, Louisiana and Minnesota; soon to arrive, no doubt, in Illinois and West Virginia, where the landfills are expected to be full in five years; and eventually even in Montana, where landfill space is, as in many other states, running short.

The problem in the Northeast, and soon to be in other regions unless there is careful planning, is that communities dived into recycling and failed to ask first whether there was anything the paper could be recycled *into*. The markets were quickly saturated, as New Jersey and Pennsylvania each picked up 200,000 short tons a year of old newspapers. Garden State, the closest newsprint recycler, is able to use only about 200,000 tons annually from all of its sources combined. So attention quickly shifted from collection to additional uses of the paper. "Developing markets" has become the shibboleth of solid waste managers.

What can we do to get newspapers to use more recycled newsprint? The question is being nailed on the publisher's door like the 95 Theses. Taxes and mandatory-use bills are among the pointed suggestions. For example:

- In California, a bill moving quickly through the legislature would require newspapers and other publishers to use recycled newsprint for 25 percent of their total newsprint consumption by 1991, and 50 percent by 2000. In addition, there is continued discussion of hefty taxes on virgin newsprint.
- In Connecticut, a mandatory-use bill has been reported out of the Joint Environment Committee by a favorable vote of 25-0 and will be placed on the Connecticut House of Representatives' calendar for consideration. The bill would require use of recycled newsprint for 20 percent of a newspaper's consumption by 1993 and 90 percent by 1998.
- In Wisconsin, the Senate Urban Affairs, Environmental Resources, Utilities and Elections Committee is planning to draft a bill to require a consumption tax on virgin newsprint used by newspapers in the state.
- In Oregon, the Oregon Newspaper Publishers Association is working to defeat mandatory-use legislation.

State press associations are having to move very quickly to meet these challenges. In most states, a task force including executives from the largest newspapers (who use the most newsprint) has been formed. A



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typical example is the Wisconsin Newspaper Publishers Association, which in May moved quickly on the tax matter by naming two executives to a new task force: A. Douglas Lyke, publisher of the Ripon Commonwealth-Press, and James Burgess, publisher of the Wisconsin State Journal in Madison. Their third team member is an outside consultant.

In Oregon, ONPA not only began direct talks with environmental groups, but it also will be creating a study commission in cooperation with the state's Department of Environmental Quality. In New York state, a task force headed by Johnson of Newsday has begun direct talks with Gov. Mario Cuomo. In Pennsylvania, a task force chaired by Sandra C. Hardy, vice president of Calkins Newspapers, is talking with state officials about attracting new recycling businesses to the state.

Other task forces are being formed or have already rolled up their sleeves.

Working with ANPA, newspaper executives are gathering data about their newsprint markets, their newsprint consumption and the ultimate resting place of that 8 million tons of newsprint that has no better place to go after use than to the landfill.

ANPA's Newsprint Resources Task Force, headed by Frank A. Bennack Jr., president and chief executive officer of The Hearst Corp., has commissioned studies of recycled fiber, solid waste options and the impact of source separation on consumers and newspapers. It soon will report its findings and recommendations.

In the meantime, there are precautionary measures newspaper executives can take.

1.) Appoint someone at your newspaper to be responsible for compliance with environmental laws, including solid waste and recycling on the local and state level.

2.) If your state press association staff has not yet become acquainted with the issues, urge it to do so. Legislation in this area tends to emerge full blown and to move quickly.

3.) In those states with legislative or gubernatorial study committees, task forces or commissions, newspapers should make every effort to be represented or at least establish a way of monitoring activities. The work products or recommendations of such groups often become legislation.

4.) Look at the history of recycled newsprint at your newspaper. If someone asks whether the newspaper is using all it could use, know the answer.

5.) Understand the solid waste disposal options. Everyone knows that landfills will always be necessary and that incinerators must sometimes be used to augment them. Waste newspapers will continue to feed both. But experts in the field have reached a broad and deep consensus that everything that can be recycled should be. First.

6.) Know that there is not even 2 million tons of recycled newsprint produced each year to supply a 13.6-million-ton demand. Newspapers cannot solve solid waste problems overnight by switching to recycled newsprint. On the other hand, if newspapers do not demand more of it, no more will be made.

7.) A number of localities have created source separation and collection programs independent of state law. Document any unwarranted or adverse consequences they may have on your operations—subscription cancellations, for example.

Finally, stay tuned. There is opportunity as well as challenge in this crisis. □

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Annual capital expenditure survey shows 465 plants spent record $1.6 billion last year

Newspapers participating in ANPA's annual survey of capital expenditures spent nearly $1.6 billion on new buildings, plant expansions and new equipment in 1988. It was the highest amount ever recorded in the survey and represented a 25-percent increase in spending over the previous year.

Thus, the billion-dollar barrier was cleared for the fourth straight year. And respondents indicated that 1989 will do likewise as they projected just under $1.4 billion in capital outlays before the year is over. (See charts below.)

In recent years, the survey projections have proved to be remarkably true to the actual spending figures reported a year later: for 1986, $1 billion projected, $1.1 billion spent; 1987, $1.2 billion projected, $1.2 billion spent; 1988, $1.6 billion projected, $1.6 billion spent.

The survey is mailed each year to all of the approximately 1,100 plants that print ANPA member newspapers. Of them, 465 responded to the latest questionnaire—444 in the United States and 21 in Canada. The response rate, which fluctuates annually, was slightly below that of the previous year, when 490 plants returned the questionnaires [presstime, June 1988, p. 128].

Newspaper respondents also projected 1989 spending of nearly $1.4 billion.

Peter P. Romano, ANPA director/technical services, said the annual fluctuation in survey participation should be taken into account in comparing year-to-year data.

In 1988, respondents spent $581.8 million on plant expansion and modernization, new buildings, land, parking and garages. That represented a whopping 107-percent increase over 1987 expenditures of $280.7 million in those categories. Projected 1989 expenditures for these purposes were put at $492.8 million.

New equipment purchases totaled $974.6 million in 1988, up from $895 million in 1987. This year's planned spending for new equipment was put at $884.7 million.

Telecommunications expenditures soared 151 percent in 1988—to $21.1 million, compared with $8.4 million in '87. Expenditures were projected to be $17.5 million this year.

A further examination of survey numbers reveals that:

- The pressroom remains king of the equipment expenditures, though spending decreased from the previous year. In 1988, newspapers spent $386.2 million for equipment in this part of the plant, or 11-percent less than the $434.2 million spent in 1987. Respondents estimated pressroom expenses will rebound this year to $424 million.
- Mailroom equipment purchases also continued to take a large chunk of the newspaper budget. Expenditures were $125.9 million in 1988, up 29 percent from

Chart 1—1989 Estimates

Newspaper Plants Participating[1]	U.S. 444	Canada 21	Totals 465
Plant Expansion and Modernization			
New building	$422,295,538	$1,368,224	$423,663,762
Addition to existing building and/or satellite building	55,831,675	50,000	55,881,675
Modernization of existing building	61,364,831	2,140,529	63,505,360
Additional land, parking, garage	49,696,274	57,055	49,753,329
Subtotal	$489,188,318	$3,615,808	$492,804,126
Telecommunications	16,484,674	1,023,000	17,507,674
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 82,617,493	$ 2,204,790	$ 84,822,183
Business—accounting, circulation	62,387,470	701,853	63,089,323
Personal computers	15,215,117	411,416	15,626,533
Library systems	2,280,506	1,113,290	3,393,796
Desktop publishing	4,119,953	875,421	4,995,374
Bar Coding	537,245	1,000	538,245
Composing room	17,678,101	1,966,587	19,644,688
Camera—platemaking, editorial photo department	12,513,731	802,209	13,315,940
Color scanners and color separation equipment	14,549,276	166,781	14,716,057
Pressroom	422,484,921	1,568,334	424,053,255
Mailroom	103,956,744	4,998,582	108,955,326
Newsprint handling and warehouse equipment	19,562,970	16,567	19,579,537
Energy, power and security management systems	7,618,276	93,404	7,711,680
New telephone and radio systems	15,014,880	60,347	15,075,227
Transportation—automobiles and trucks	32,995,171	1,736,549	34,731,720
New furniture and office equipment	28,230,666	987,118	29,217,784
Newspaper vending machines	9,705,712	2,753,702	12,459,414
Commercial or job printing equipment	7,570,607		7,570,607
Waste Ink Reclaiming Equipment	756,420	585	757,005
Other	4,457,435	59,090	4,516,525
Subtotal	$864,252,594	$20,517,625	$884,770,219
Estimated Total Outlays	$1,369,925,586	$25,156,433	$1,395,082,019

[1] Figures represent only those ANPA-member plants reporting and not all daily newspapers.

Chart 2—1988 Expenditures

Newspaper Plants Participating[1]	U.S. 444	Canada 21	Totals 465
Plant Expansion and Modernization			
New building	$334,748,109	$47,348,000	$382,096,109
Addition to existing building and/or satellite building	64,722,352	50,000	64,772,352
Modernization of existing building	79,884,554	6,939,000	86,823,554
Additional land, parking, garage	46,704,269	1,400,000	48,104,269
Subtotal	$526,059,284	$55,737,000	$581,796,284
Telecommunications	18,858,153	2,250,000	21,108,153
New Equipment			
Computers (hardware and software)			
Front-end systems—editorial, classified, advertising	$ 101,713,349	$ 8,484,242	$110,197,591
Business—accounting, circulation	69,581,092	6,703,390	76,284,482
Personal computers	16,035,636	1,360,750	17,396,386
Library systems	3,805,636	1,372,500	5,178,136
Desktop	4,993,958	923,800	5,917,758
Bar Coding	853,094	406,000	1,259,094
Composing room	23,685,165	4,014,000	27,699,165
Camera—platemaking, editorial photo department	25,846,160	322,900	26,169,060
Color scanners and color separation equipment	12,557,845	23,082,210	35,640,055
Pressroom	374,912,590	11,323,200	386,235,790
Mailroom	118,309,821	7,603,500	125,913,321
Newsprint handling and warehouse equipment	16,834,133	660,850	17,494,983
Energy, power and security management systems	11,171,699	265,500	11,437,199
New telephone and radio systems	14,948,247	129,000	15,077,247
Transportation—automobiles and trucks	40,833,945	1,783,000	42,616,945
New furniture and office equipment	38,833,911	954,100	39,788,011
Newspaper vending machines	9,175,074	3,102,800	12,277,874
Commercial or job printing equipment	4,804,939	15,000	4,819,939
Waste Ink Reclaiming Equipment	2,436,420	30,000	2,466,420
Other	10,323,218	472,000	10,795,218
Subtotal	$901,655,932	$73,008,742	$974,664,674
Total Outlays	$1,446,573,369	$130,995,742	$1,577,569,111

$97.4 million in 1987. Newspapers said they expect to spend $109 million this year for mailroom machinery.

• Front-end systems, including editorial, classified and display-advertising systems, cost respondents $110.2 million in 1988, nearly 10 percent more than the $100.3 million spent the previous year. Survey participants projected a decrease in '89 expenditures to $84.8 million.

• Hardware and software for business applications cost $76.3 million in 1988, a 57-percent jump from $48.5 million in 1987. Expenditures this year were put at $63 million.

• Spending for personal computers used internally by newspapers—for uses other than editorial, classified or advertising—decreased 15 percent in 1988 from $20.4 million to $17.4 million. A further decrease was projected for 1989, to $15.6 million.

• In one of two new survey categories, responding newspapers spent $5.9 million on desktop-publishing equipment for editorial, classified and advertising uses in 1988. They projected expenditures of $5 million this year.

• Bar-coding equipment was the survey's second new category. Respondents spent $1.3 million for such devices last year and said they would spend $538,245 this year.

• Newsprint handling and warehouse equipment expenditures were $17.5 million in 1988, up 24 percent from $14.1 million in 1987. A further increase to $19.6 million was projected for 1989.

• Expenditures for waste ink reclamation equipment were $2.5 million in 1988, a 92-percent increase from 1987's $1.3 million. A decrease to $757,005 was projected for this year.

• In the area of energy, power and security management, respondents spent $11.4 million in 1988, down about 2 percent from $11.6 million the previous year. Participants indicated there will be a greater decrease this year to $7.7 million.

• Spending for new furniture and office equipment totaled $39.8 million last year, up 17 percent from $34.1 million in 1987. A decrease in expenditures to $29.2 million was projected for '89.

• Color scanning and separation equipment are on something of a sales roller coaster. In 1988, $35.7 million was spent in that area, a 240-percent increase from $10.5 million in 1987. But a decrease to $14.7 million was projected for this year.

• The camera room, including platemaking and the editorial photo department, followed a similar pattern. Expenditures zoomed to $26.2 million in 1988, an 86-percent increase from the $14.1 million reported in the previous survey. Expected spending this year totaled $13.3 million. □

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4-month consumption by dailies is down

Newsprint consumption by all U.S. users totaled 1,060,376 metric tons in April, an increase of 3.6 percent from April 1988. An extra Sunday accounted for about 3 percent of the increase.

For the first four months of 1989, overall consumption was up 0.3 percent.

U.S. daily newspapers in April used 792,757 metric tons, 2.4 percent more than a year earlier. But for the four-month period, their consumption was down 0.7 percent.

Newsprint inventories for newspapers in ANPA's statistical sample averaged a 41-day supply, compared with a 46-day supply in April 1988. Stocks of North American mills were up 25 percent from April '88.

Canadian newsprint mills operated at 94 percent of rated capacity in April and at 96 percent for the year-to-date. U.S. mills operated at 97 percent and 96.4 percent, respectively.

Estimated consumption of all U.S. daily newspapers[1]

Region	February 1989(r)	February 1988	% Change
Northeast	170,838	184,731	-7.5
North Central	144,715	150,366	-3.8
South	221,319	227,621	-2.8
West	161,713	167,700	-3.6
Circulation Size			
up to 25,000	52,344	55,317	-5.4
25,001-100,000	152,631	154,687	-1.3
Over 100,000	493,610	520,414	-5.2
February totals	698,585	730,418	-4.4
Region	**March 1989**	**March 1988**	**% Change**
Northeast	188,580	200,684	-6.0
North Central	166,443	166,918	-0.3
South	257,914	250,576	+2.9
West	183,065	182,494	+0.3
Circulation Size			
up to 25,000	60,170	60,742	-0.9
25,001-100,000	178,703	167,938	+3.4
Over 100,000	562,129	571,992	-1.7
March totals	796,002	800,672	-0.6
Region	**April 1989(p)**	**April 1988**	**% Change**
Northeast	197,806	200,914	-1.5
North Central	167,547	155,627	+7.7
South	249,095	237,358	+4.9
West	178,309	180,328	-1.1
Circulation Size			
up to 25,000	58,577	58,812	-0.4
25,001-100,000	170,620	166,839	+2.3
Over 100,000	563,560	548,576	+2.7
April totals	792,757	774,227	+2.4
Four-month totals	3,085,110	3,026,371	-0.7

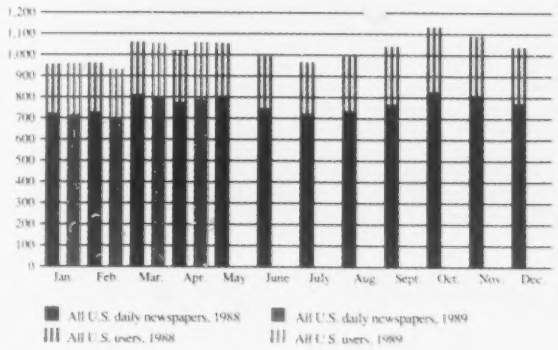
Estimated consumption of all U.S. users

	1988	1987	% Change
January totals	962,781(r)	957,597	+0.5(r)
February totals	934,968(r)	963,880	-3.0(r)
March totals	1,057,099	1,059,279	-0.2
April totals	1,060,376(p)	1,023,484	+3.6(p)
Four-month totals	4,015,224(p)	4,004,240	+0.3(p)

Production

	Canada	U.S.A.	North America
March 1989	806,272	468,485	1,274,757
March 1988	874,324	462,533	1,336,857
Increase/decrease	-68,052	+5,952	-62,100
	-7.8%	+1.3%	-4.6%
April 1989	814,012	448,827	1,262,839
April 1988	826,229	450,934	1,277,163
Decrease	-12,217	-2,107	-14,324
	-1.5%	-0.5%	-1.1%
Four months 1989	3,247,955	1,781,147	5,029,102
Four months 1988	3,336,930	1,800,178	5,137,108
Decrease	-88,975	-19,031	-108,006
	-2.7%	-1.1%	-2.1%

Estimated newsprint consumption, 1988-1989 (thousands of metric tons)



Shipments

From Canadian mills	U.S.A.	Canada	Export	Total
March 1989	582,856	90,206	140,376	813,438
March 1988	638,803	108,080	134,216	881,099
April 1989	546,229	96,803	142,719	785,251
April 1988	575,697	100,344	112,567	788,608
Four months 1989	2,216,422	377,246	498,584	3,092,252
Four months 1988	2,337,548	398,410	431,376	3,167,334
Increase or decrease	-121,126	-21,164	+67,208	-75,082
	-5.2%	-5.3%	+15.6%	-2.4%
From U.S. mills				
March 1989	424,734		36,889	461,613
March 1988	435,564		22,653	458,217
April 1989	401,606		40,150	441,756
April 1988	419,755		26,318	446,073
Four-months 1989	1,596,179		155,566	1,751,745
Four-months 1988	1,679,934		96,483	1,776,417
Increase or decrease	-83,755		+59,083	-24,672
	-5.0%		+61.2%	-1.4%
From North American mills				
Four months 1989	3,812,601	377,246	654,150	4,843,997
Four months 1988	4,017,482	398,410	527,859	4,943,751
Increase or decrease	-204,881	-21,164	+126,291	-99,754
	-5.1%	-5.3%	+23.9%	-2.0%

Stocks

U.S. publishers[2]	Tonnage	Days' supply On hand	Days' supply In transit
February 1989	925,110(r)	39	5
February 1988	930,981	37	7
March 1989	889,250	36	5
March 1988	962,255	39	6
April 1989	850,042(p)	35(p)	5(p)
April 1988	971,780	40	6
Canadian mills			
March 1989	417,430		
March 1988	321,070		
April 1989	446,191		
April 1988	358,691		
U.S. mills			
March 1989	70,424		
March 1988	55,031		
April 1989	77,495		
April 1988	59,892		

[1]Based on stratified data from newspapers in ANPA statistical sample; figures in this and other tables are in metric tons.

[2]Represents stocks of newspapers in ANPA statistical sample.
(r) = revised (p) = preliminary

NOTE

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